



District of Columbia Retirement Board (DCRB)

Meeting Minutes for the Data Management Project Pre-Proposal Conference

12 August 2014

Subject	Data Management Project Pre-Proposal Conference
Location	DCRB Board Room
Time	12 August 2014 • 10 a.m.

Discussion

- **Questions and Answers:**

Question: When this project is completed, will the PIMS use this proposed system as the central repository?

Response: Yes. That's our long-term plan. Instead of having the data in the PIMS, we want to have it in a central repository instead of multiple places. We'll want to put the data through data quality and prepare the data on the active side.

Question: So this is going to be the system that validates the data from the feed?

Response: We're going to get bi-weekly feeds about active members from the District, and we're going to get weekly feeds about annuitant/retirees from Treasury. We'll want to process the data through data quality, and we'll want to prepare the data on the active side when someone wants to retire as well as prepare statements of benefits.

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Question: Bi-weekly and weekly feeds—format of data. Amount of data. It went too detailed. How much data is coming in every week? A terabyte?

Response: That will be based on the solution that you propose. You will have to do the calculations based on the information given to proposed vendors through the RFP. I'm not allowed to give you the specific information on the size of the data. We're getting data from two PeopleSoft systems, so if you look at PeopleSoft architecture for information—that's the size of the data that we're getting. We've given you the number of members we have that are active, and every two weeks, we're getting information payroll from the District. We've answered the type of information that is captured. You can calculate what the overhead is going to be based on the source systems. We've told you the number of records, and it's your responsibility to do the calculations based on the systems that the information is coming from.

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Question: With the number of questions submitted, are you providing an extension of the due date?

Response: We're not considering amending the solicitation to lengthen the solicitation period. If we do make an extension, it will be in writing, and the prospective vendors will be notified. We answered all of 400 questions, and we feel that we clarified everything. If we do extend it, it will be noted on the website.

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Question: Hardware costs—do they need to be provided with the proposal?

Response: The solution proposed will include hardware—if that is what you propose. We would like you to propose the hardware solution within the confines of the technologies that we want to use as stated in the RFP, but DCRB reserves the right to purchase the hardware themselves.

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Question: Can you clarify if the vendor will be configuring high availability, or will DCRB be responsible for high availability configuration?

Response: We have high availability in both D.C. and in Ashburn. You should propose your best recommendation for high availability and we'll see if it fits in with our architecture. We'll adapt if we need to.

Question: For the actual installation and configuration, will DCRB perform that or will the vendor?

Response: If you're going to cluster some databases, then we want the vendor to configure the database clusters. If you propose two clusters, then we'll want you to configure the communication between those two clusters. We have NetBackup, so that is the solution that we are using to backup whatever databases you are using in your solution. The reason we're doing high availability is that we are trying to be fault tolerant and trying to maintain maximum uptime and have a reliable system. Even if the database environ

Question: Some time clients configure the high availability portion of it, so I want to be clear who is responsible for the high availability?

Response: We would like to see the vendor's proposed high availability solution.

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Question: When do you require the data management system to be active?

Response: I can't tell you how long to propose this implementation to be. We see a 6-8 month implementation in preparation for a PIMS implementation that will come later in the mid-to-latter half of FY15.

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Question: The first stop will be EDQ and the next stop will be MDM. Is there an interest in looking at an automated solution as opposed to a staging approach where the data goes

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through the EDQ and then stops?

Response: We're very interested in automated solutions and encourage you to propose it.

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Question: Your ESB—can you unpack that a little more in reference to any type of alternative solution that could be proposed that does the same thing as an ESB but more efficiently?

Response: We're architecting a service oriented architecture (SOA). The reason why we see as the ESB as a foundational element of what we're doing. You can propose whatever solution you would like that you know works with your product.

Comment We don't want to propose a solution that you don't want, but there are solutions that can do the things more efficiently than ESB.

Response: DCRB encourages you to propose your solution.

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Question: What experience has DCRB had in doing point-to-point or message-to-message validation and passage with an ESB?

Response: DCRB has not used a service bus, but members of the DCRB staff have worked with ESB. You are welcome to propose an alternate to an ESB.

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Question: Can we offer alternate proposals—one using ESB and one with an alternate solution to ESB?

Response: Yes.

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Question: Questions 36 and 94 where we're asking questions on sizing—I think your answer was initially that the vendors need to do their own sizing or proposed sizing. It's not explicitly in the answer, so I guess it's up to the vendors to propose the sizing.

Response: When we do sizing on a database, we know the overhead, we know the footprint of that database, and we know all of the elements that need to be captured, and so it will be a disservice if I try to tell you the size when I don't know what you're proposing. Your solution(s) needs to be based on the number of members and so forth.

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Question: In my experience, when we do high availability between two data centers, the firewall team can play a very big role. Will they be willing to help us to open any ports?

Response: Our network team will work with the vendor to integrate the solution. In our long-term plans, we have hardware-based load balancing, but we don't have that in place yet, so we want vendors to propose a solution that will work until we get the rest of our infrastructure in place. We'll scale our communications to the other data center, as needed.

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Question: There may be additional factors to be considered--can you share those factors dealing

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with performance outside the United States borders?

Response: DCRB has a security and background checks process for anyone who comes into contact with your IT and network infrastructure. That includes for security and background check confidentiality agreement for those outside of the United States and the metro area. In addition to submitting a technical response and price proposal, there are other things that need to occur before a contract is awarded.

Question: Do you have any details posted on your website about your background checks?

Response: On the cusp of awarding the contract to a potential vendor, we will contact that vendor and request a security and background check. We don't want to put all potential vendors through a security and background check because that would be a waste of money for potential vendors. We would like you to indicate if you have resources outside of the United States. That needs indicated in your proposal.

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Question: Can work be done offsite?

Response: Work could be done offsite, and some work could be done onsite. When you need to meet with subject matter experts (SMEs) and you when we're doing implementation, space will be made onsite.

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Question: There is a section in the RFP that talks about a deep technical review of the technology for down-selected vendors. How deep will that go and will you require a behind-the-curtain view of what is really going on?

Response: We're trying to architect an integrated solution here at DCRB, so it will be vital for us to understand the technology that is being put in place. We will want to work closely with that vendor to ensure that what we're implementing is secure and will work as architected for the agency.

Question: Do you feel that the current requirement in the RFP for eight-hour technical deep dive is enough to give you that comfort level or will there be more considered?

Response: We'll consider more if it's required.

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Question: If the architected solution proposed doesn't include an ESB, do you still want the ESB proposed even if it's something that is not ultimately used?

Response: We'll consider alternatives to a service bus, but a solution should be proposed that includes a service bus because I am not yet convinced that something should be used besides

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Question: You will probably get a number of requests for extensions. When will you make a final decision on when you give an extension?

Response: It would irresponsible for us to give you a drop-dead date for a possible solicitation extension. If we amend the solicitation, we will consider giving you an extension, but we cannot

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give you a drop-dead date for possible extension.

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Question: Is there a preferred contract vehicle?

Response: I believe that the solicitation states that it's a hybrid contract. The price proposal worksheet guides you in that direction as well. If there are any follow-up questions about this, please contact me.

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Question: There were several questions about Oracle database licenses. Do you have the ability to share enterprise licenses?

Response: Licenses will not be an issue. If it were an issue, we could partner with the D.C. Office of the Chief Technology Officer (OCTO).

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Question: Governance and central maintenance of data: there was an interest in keeping master data and governance separate yet in historical terms, they tend to be one in the same because when you are mastering data, it is also being governed.

Response: We see mastering data and governance as interrelated.

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Question: Is there any need to feedback information into the sources?

Response: On the active side, if we need corrections, we will request information. We will provide them with exception reporting, but I don't think we'll be sending back information. On the annuitant side, we want to be able to provide that information to U.S. Department of the Treasury so that they can import them into their STAR system and retire, which is a manual process currently. Any solution that you propose will need data exported from it.

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Can you clarify language in the paragraph below (from the RFP)? I want to ensure that DCRB will accept a proposal in which a Systems Integrator (SI) primes and includes a software/hardware quote from an authorized reseller of the software/hardware with existing software/hardware contract vehicle in place. The SI in this case would not be the actual reseller of the software/hardware...the reseller would. This is standard procedure for many proposals, would be necessary in this case, and I want to ensure the language below does not prohibit

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this.

“The objective of this request for proposal is for DCRB to select a single software (integrator) offeror and solution(s) for its ESB, EDQ, and MDM solution and the services necessary to implement, configure, transition, maintain and customize the solution to DCRB’s IT organization. We anticipate awarding a one (1) year firm term contract with 3 one (1) year option periods.”

Response: DCRB will accept a proposal that includes a hardware quote from a reseller.

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Question: There is a line in the Infrastructure Requirements Section on Page 7 that states:

“4. Databases

- a. The ESB, EDQ and MDM solutions must be optimized to run on an Oracle database.”*

We create solutions on Microsoft technologies. Our stack clearly does not meet this criterion, but before we move on, I just wanted to clarify that this is indeed the intent of DCRB?

Response: The solution is incompatible with the technologies DCRB wants to implement and may not be considered.